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ABSTRACT

This is the second of four student packets forming part of a position simulation for use in an office applications laboratory at the postsecondary level. The purpose of the simulation is to give the student an opportunity to learn the tasks and duties performed by a legal secretary. The packet, which begins with a simulated office schedule for one 8-hour day, includes 6 numbered jobs and supplies before each job. Jobs include typing a subpoena, typing a deed to secure a debt and note from a rough draft, typing a divorce complaint from dictation, before each job. Jobs include typing a subpoena, typing a deed to secure a debt and a note from a rough draft, typing a divorce complaint from dictation, typing a rough letter, and typing a warranty deed. (YLB)

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GA313309

OFFICE OCCUPATIONS

Mae Conn and Associates

A Legal Secretary Position Simulation

Student Packet 2

U.S. DEPARTMENT OF EDUCATION
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Georgia Department of Education

OFFICE OCCUPATIONS

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Office of Vocational Education
Georgia Department of Education
Atlanta, Georgia 30334
Charles McDaniel, State Superintendent of Schools
1982

GPD 7729/7-82

MAE CONN AND ASSOCIATES

A Legal Secretary Position Simulation

Developed by

Macon Area Vocational-Technical School
Macon, Georgia

Revised by

Georgia State University
Atlanta, Georgia

Project Supported by

Office of Vocational Education
Georgia Department of Education
Division of Program Development
Atlanta, Georgia 30334

Dr. Charles McDaniel, State Superintendent of Schools

1982

FOREWORD

This legal secretary position simulation was designed to be used in an office applications laboratory at the postsecondary level. Its purpose is to give the student an opportunity to perform those tasks and duties that may be performed by a legal secretary.

Appreciation is expressed to Mr. K. Gerald Allen, Project Coordinator, and to the business education instructors at Macon Area Vocational-Technical School for the development of these materials.

Appreciation is also expressed to the many business education instructors throughout the state who field tested and provided invaluable feedback on these materials as a part of this revision effort.

Sincere thanks go to Dr. John H. Lloyd, Director, Program Development Division, Georgia Department of Education, for his continued encouragement, support, and leadership in this revision effort.

Dr. Harmon Fowler
Project Director
Office Simulation Project

Mrs. Doris Rash-Wooten
Assistant Project Director
Office Simulation Project

Tuesday

OFFICE SCHEDULE FOR TODAY		
	FOR	DESCRIPTION OF SERVICES
8 00 15 30 45	Julia P. Thurling	Type a Subpoena
9 00 15 30 45	J. Paul Cain	Type a Deed to Secure Debt & Notes
10 00 15 30 45	Bessie L. Smith	Complete the Complaint for Divorce
11 00 15 30 45		
12 00 15 30 45		
1 00 15 30 45		Letter of Authorization for Medical Records for Mrs. Kiernan
2 00 15 30 45	Thomas W. White	Type a Warranty Deed
3 00 15 30 45		Handle new clients
4 00 15 30 45		
5 00 15 30 45		
NIGHT HOURS		

I need this Subpoena as soon as possible.

Thanks
Mae

In the Superior Court of Bibb County, Georgia

Julia P. Shurling Plaintiff	Civil Action No. 49514
vs.	SUBPOENA
Ricky A. Shurling, Defendant	

S.S. TO: Payroll Supervisor, Jones Manufacturing Co.
3600 Jonesco Drive, Macon, GA 31206

Greetings:

You are hereby commanded, that, laying all other business aside, you personally be and appear at the Superior Court courtroom, Bibb County Courthouse, Macon, Georgia, at 10:00 a.m. on the 15th day of August 19--, then and there to be sworn as a witness in the above-captioned action for the purpose of giving testimony on oral examination.

You are further commanded to bring with you at that time and place the materials

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Page 2 of Subpoena — ref: Thurling vs. Thurling

specified in the attached list which is made a part hereof by reference hereto, which is within your possession, custody or control in order that they may be inspected and inquired into.

Herein fail not under penalty of the law.
Witness my hand and seal of the Court, this _____ day of July, 19—.

Deputy Clerk, Bibb Superior Court

Below is the list which must be attached separately:

Subpoena - Materials Required for Inspection and Inquiry

1. All payroll records, including journals, registers, vouchers, canceled checks, tax records, etc.
2. Time cards
3. Personnel records, including anecdotals
4. Any other information or materials relative to this.

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FROM THE DESK OF MAE CONN

Type the deed to secure debt and note. Refer to the partially completed illustration

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$_____ _____, Georgia,_____19____

FOR VALUE RECEIVED, _____promise to pay to the order of_____

_____the principal sum of

_____($)DOLLARS,

in legal tender of the United States, with interest thereon from date at the rate of _____(%) per centum per annum, on the unpaid balance until paid, in _____installments, as follows:

Principal and interest are payable at:_____
or at such other place as the holder hereof may designate in writing.

Should any installment not be paid when due, or should the maker, or makers, hereof fail to comply with any of the terms or requirements of a security deed of even date herewith, conveying title to real property located in _____
as security for this indebtedness, the entire unpaid principal sum evidenced by this note, with all accrued interest, shall, at the option of the holder, and without notice to the undersigned, become due and may be collected forthwith, time being of the essence of this contract. It is further agreed that failure of the holder to exercise this right of accelerating the maturity of the debt, or indulgence granted from time to time, shall in no event be considered as a waiver of such right of acceleration or estop the holder from exercising such right.

In case this note is collected by law, as through an attorney at law, all costs of collection, including fifteen per centum (15%) of the principal and interest as attorney's fees, shall be paid by the maker hereof.

And each of us, whether maker, endorser, guarantor, or surety, hereby severally waiver and renounces, for himself and family, any and all exemption rights either of us, or the family of either of us, may have under or by virtue of the Constitution or laws of Georgia, or any other State, or the United States, as against this debt or any renewal thereof; and each further waives demand, protest and notice of demand, protest and non-payment.

This contract is to be construed in all respects and enforced according to the laws of the State of Georgia.

PREPAYMENT PRIVILEGE:

WITNESS_____hand___and seal _____(Seal)

_____(Seal)

NOTE SECURED BY REAL ESTATE, VARIABLE INSTALLMENTS 2-2

$ 20,000 Macon, Georgia, July 10 19___

FOR VALUE RECEIVED, we promise to pay to the order of ____

J. Paul Cain the principal sum of

Twenty thousand ($20,000) DOLLARS,

in legal tender of the United States, with interest thereon from date at the rate of Ten (10 %) per centum per annum, on the unpaid balance until paid, in 240 installments, as follows: monthly installments including principal and interest of one hundred ninety-three and 01/100 ($193.01) due on the 1st day of each month beginning on the 1st day of August, 19__. Macon, Georgia

Principal and interest are payable at: or at such other place as the holder hereof may designate in writing.

Should any installment not be paid when due, or should the maker, or makers, hereof fail to comply with any of the terms or requirements of a security deed of even date herewith, conveying title to real property located in Macon, Georgia as security for this indebtedness, the entire unpaid principal sum evidenced by this note, with all accrued interest, shall, at the option of the holder, and without notice to the undersigned, become due and may be collected forwith, time being of the essence of this contract. It is further agreed that failure of the holder to exercise this right of accelerating the maturity of the debt, or indulgence granted from time to time, shall in no event be considered as a waiver of such right of acceleration or estop the holder from exercising such right.

In case this note is collected by law, as through an attorney at law, all costs of collection, including fifteen per centum (15%) of the principal and interest as attorney's fees, shall be paid by the maker hereof.

And each of us, whether maker, endorser, guarantor, or surety, hereby severally waiver and renounces, for himself and family, any and all exemption rights either of us, or the family of either of us, may have under or by virtue of the Constitution or laws of Georgia, or any other State, or the United States, as against this debt or any renewal thereof; and each further waives demand, protest and notice of demand, protest and non-payment.

This contract is to be construed in all respects and enforced according to the laws of the State of Georgia.

PREPAYMENT PRIVILEGE:

WITNESS our hands & seals _____ (Seal)
Thomas W. White

_____ (Seal)
Ann S. White

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FROM THE DESK OF MAE CONN

RE: Complaint for Divorce

Bessie L. Smith vs. Danny E. Smith

From the dictation provided, please complete the Complaint for Divorce, civil action 1050, in the style demonstrated in your Employee handbook.

Thanks

MC

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Please type this letter & send a carbon copy to the plaintiff.

Medical Center of Central Georgia
Medical Records
P. O. Box 6000
Macon, GA 31208

Attention: Mrs. Kiernan
Re: Authorization for Medical Records

Sally Seymore was at the Emergency Room as a result of injuries she sustained in an automobile accident on April 10, 19--.

I would appreciate it if you would send me copies of all the Emergency Room records connected with the diagnosis, treatment and prognosis of Sally Seymore.

Enclosed is the necessary authorization for the release of this medical information. We thank you for your assistance in this matter.

Very truly yours,

2-4

MAE CONN & ASSOCIATES

Attorneys at Law 3300 Macon Tech Dr.

Macon, Ga. 31206 Telephone 781-0551

AUTHORIZATION FOR MEDICAL INFORMATION

Macon, Georgia

Dated _____

TO WHOM IT MAY CONCERN:

This authorizes the physicians, hospital and all medical attendants to furnish full and complete medical reports, charges and information hereby requested by the law firm of WESTMORELAND, PATTERSON & MOSELEY, or to any representative, attorney, or investigators from said firm, and especially any and all medical reports concerning injuries received as the result of an accident which occurred on the 10th day of April, 19-; this authorization also includes examination of all hospital records, x-ray film, and furnishing of any information including opinions, which will aid the said attorneys in the prosecution of claims against the insurance carriers and others for injury sustained. The said law firm has been retained to represent me in connection with the claim and to take all necessary steps to secure the collection thereof.

Your full cooperation with my attorneys is requested. You are further requested to disclose no information to any insurance adjusters or other persons without written authority to do so. ALL PRIOR AUTHORIZATION IS HEREBY CANCELLED.

Sally Seymore
PATIENT

Mrs. Josie McKee
WITNESS

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FROM THE DESK OF MAE CONN

Fill in the blanks on the warranty deed with the following information. Remember to type dollar amounts in words and figures.

1. Bibb
2. 10th
3. July
4. (Current Year)
5. J. Paul Cain
6. Georgia
7. Bibb
8. Thomas W. White and Ana S. White
9. Georgia
10. Bibb
11. y
12. $1,000
13. s
14. es
15. ies
16. their

17. in Land Lot #105 of the 19th District of Bibb County, Georgia, Shurlington Subdivision, City of Macon, and being known as Lot 324, Block 16, as shown by a map recorded in Plat Book 29, Folio 14, Clerk's office, Bibb Superior Court. There is on said property a house known under the present numbering system as 6040 Hill Road.

18. ies
19. their
20. y
21. his
22. ies
23. their
24. y
25. s
26. his
27. leave blank

WARRANTY DEED

STATE OF GEORGIA, County of 1

This INDENTURE, Made this 2 day of 3 in the Year of Our Lord One Thousand Nine Hundred and 4 between

5

of the State of 6 and County of 7 of the first part,

and 8

of the State of 9 and County of 10 of the second part,

WITNESSETH: That the said part 11 of the first part, for and in consideration of the sum of 12 DOLLARS, in hand paid, at and before the sealing and delivery of these presents, the receipt of which is hereby acknowledged, ha 13 granted, bargained, sold and conveyed, and by these presents do 14 grant, bargain, sell and convey unto the said part 15 of the second part, 16 heirs and assigns, all that tract or parcel of land lying and being in 17

TO HAVE AND TO HOLD the said tract or parcel of land, with all and singular the rights, members and appurtenances thereof, to the same being, belonging, or in anywise appertaining to the only proper use, benefit and behoof of the said part 18 of the second part, 19 heirs and assigns, forever, in Fee Simple.

AND THE SAID part 20 of the first part, for 21 heirs, executors, and administrators, will warrant and forever defend the right and title to the above described property, unto the said part 22 of the second part, 23 heirs and assigns, against the claims of all persons whomsoever.

IN WITHESS WHEREOF, the said part 24 of the first part ha 25 hereunto set 26 hand and seal 27 the day and year above written.

Signed, sealed and delivered in presence of:

_____ _____ (Seal)

_____ _____ (Seal)

_____ _____ (Seal)

WARRANTY DEED

STATE OF GEORGIA, County of _____

This INDENTURE, Made this ___day of _____in the Year of Our Lord One Thousand Nine Hundred and _____between

_____

of the State of _____and County of _____of the first part,

and _____

of the State of _____and County of _____of the second part,

WITNESSETH: That the said part___of the first part, for and in consideration of the sum of _____DOLLARS, in hand paid, at and before the sealing and delivery of these presents, the receipt of which is hereby acknowledged, ha__granted, bargained, sold and conveyed, and by these presents do__grant, bargain, sell and convey unto the said part___of the second part, _____heirs and assigns, all that tract or parcel of land lying and being in

TO HAVE AND TO HOLD the said tract or parcel of land, with all and singular the rights, members and appurtenances thereof, to the same being, belonging, or in anywise appertaining to the only proper use, benefit and behoof of the said part___of the second part,_____heirs and assigns, forever, in Fee Simple.

AND THE SAID part___of the first part, for_____heirs, executors, and administrators, will warrant and forever defend the right and title to the above described property, unto the said part___of the second part, _____heirs and assigns, against the claims of all persons whomsoever.

IN WITNESS WHEREOF, the said part___of the first part ha__hereunto set_____hand and seal__the day and year above written.

Signed, sealed and delivered in presence of:

_____ _____(Seal)

_____ _____(Seal)

_____ _____(Seal)

FROM THE DESK OF MAE CONN

Page 1

A new client is coming in today. Each time the firm accepts a new client, a permanent file number must be assigned. The name, address, telephone, and client file number should be typed on a 3x5 index card and alphabetized with the other clients.

Also, a client worksheet should be completed. Type the following information on the client worksheet.

Case: 35557 (This is the client file number)
Conference Date: Today's date
Injured's Name: Dorothy B. Rate
DOB: 1/18/52 ss# 285-95-0742
Spouse/Parent: Johnny C. Rate

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Page 2

D.O.B. 5/2/50 SS# 274-06-9431
Mailing Address: 5454 Bass Rd.
Macon, GA 31204
Home Phone: 781-0596
Business Phone: 477-8015
Defendant's Name & Address:

Marvin F. Harvey
5112 Jeffersonville Rd.
Macon, GA 31206
Date of Accident: July 3, 19--
Location: intersection of Napier Ave.
& Pio Nono Ave.
Date of Limitation: July 31, 19--
Report of GSP/PD: July 3, 19--
Witness: Bill B. Harris
Phone: 742-3152
Witness: Carol R. Swint
Phone: 746-1091
Other Occupants of Vehicle: None

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Vehicles:

Operator of car: Dorothy B. Rale
Model/Make: 1979 Chev. Camaro
Owner of Car: Dorothy B. Rale
Location: Intersection: Napier & Rio Nono Avenues
Photos: Yes P/D Claim: No
Operator of Car: Marvin F. Harvey
Model/Make: 1969 Volkswagon
Owner of Car: Marvin F. Harvey
Location: Same as above
Photos: Yes

Insurance

Client's Co.: All State
On Notice: Yes Coverage: Liab.; UM; Col.
Adjuster: Mr. J. C. Morgan
Phone: 742-1291

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Defendant's Co.: Hiers Ins. Agency
On Notice: Yes
Coverage: Liab; U.M
Adjuster: Mr. J. M. Nelson
Phone: 788-1010

Hospital
Medical Center of Central GA
7/3 to 7/6

Docter
Dr. B. N. Moore 7/3 to 7/6

Nature of Injuries: Broken leg

Employer: B & W Mfg. Co.
Supervisor: Mr. Charles Snider
Job: Administrative Assistant
Earnings: $7,861/yr.
Dates of Absence: 7/3 to 7/15

CLIENT WORK SHEET

CASE: _____

CONFERENCE DATE: _____ SOURCE: _____

GENERAL

Injured's Name: _____

DOB: _____ SS# _____

Spouse/Parent: _____

DOB: _____ SS# _____

Mailing Address: _____

Home Phone: _____ Business Phone: _____

Defendant's Name and Address: _____

_____

Other Defendants: _____

_____

Date of Accident: _____ Location: _____

Date of Limitation: _____ Report of GSP/PD: _____

Witnesses: _____ Phone: _____

_____ Phone: _____

Other Occupants of Vehicle: _____

_____

Remarks: _____

VEHICLES

Plaintiff:

Operator of Car _____ Model/Make _____
Owner of Car _____
Location _____ Photos (Yes/No) _____
P/D Claim (Yes/No) _____ Other _____

Defendant:

Operator of Car_____ Model/Make_____
Owner of Car_____
Location_____ Photos (Yes/No)_____

Other Vehicles_____

INSURANCE

Client's Company:_____
On Notice (Yes/No)_____ Coverage: Liab._____ UM___ MP___ Col._____
Adjuster:_____ Phone:_____
Other Insurance/Other Adjuster:_____

Defendant's Company:_____
On Notice (Yes/No)_____ Coverage: Liab._____ UM___ MP___ Col._____
Adjuster:_____ Phone:_____
Limits:_____

Insurance Remarks:_____

MEDICAL

Hospital	Address	Treatment Dates

Doctor (Specialty)	Address	Treatment Dates

Nature of Injuries:_____

Prior Hospitalization, Injuries, or Related Medical History:_____

EMPLOYMENT

Employer:_____

Supervisor:_____

Job:_____ Earnings:_____

Dates of Absence:_____

STATEMENTS

At Scene:_____

_____

_____

To Adjuster:_____

_____

Other:_____

_____

Traffic Charges:_____

Against Whom:_____ For What:_____

Disposition:_____ SRL3 Filed (Yes/No)_____

REMARKS/NOTES/EXPLANATIONS

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____